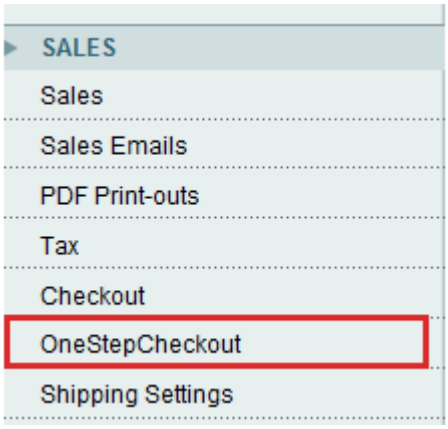
OneStepCheckout User Manual

This is the user manual for OneStepCheckout version 0.2.0 and higher. This manual explains how to use OneStepCheckout as a store owner, how the different administration settings work and so on.

After installing OneStepCheckout (see separate installation guide) you will see a new option under the "Sales" group in "System" -> "Configuration" called "OneStepCheckout" (see image to your right).



Click this link to open the settings page for OneStepCheckout. The available settings are split into several groups. The available groups are "General", "Exclude/include fields", "Registration", "AJAX update shipping/payment methods" and "Terms and conditions"

Each group and setting is explained in this manual, and we start with the general settings.

General

Serial

The serial field is used to verify that you have a valid license of OneStepCheckout. Upon purchasing the product from www.onestepcheckout.com or from one of our partners, you will be provided a serial number that you need to enter in this field. Unless a valid serial number is entered, the checkout will display a "Please enter a valid serial" message.

Default country

Use this setting to set a default country for the checkout. The default country will also choose which shipping and payment methods that should be displayed to the user, as they may be different for different countries. This can be used in combination with the GeoIP feature to allow auto-detection of users country with fallback to the default country.

Default shipping method

This setting allows you to set a default shipping method that will be pre-selected for the user once he/she enters the checkout page.

Default payment method
This setting allows you to define a payment method that will be pre-selected for the user when entering the checkout page.

Checkout title
This setting is the text that will be displayed in the title at the top of the checkout.

Checkout description
This setting is the text that will be displayed below the title at the top of the checkout. You can enter HTML in this field if you want.

Enable different shipping address
Some stores doesn't want users to be able to ship to a different address than their billing address. This feature lets you disable this option so the user won't be bothered with it.

Enable gift messages
If you want your customers to be able to enter a gift message for their order, enabling this setting will allow them to do that.

NB: To use this feature, you need to have enabled the "Allow Gift Messages on Order Level" setting under System -> Configuration -> Sales -> Gift messages

Enable GeoIP
GeoIP is a technology that can automatically detect a users country based on their IP address. You can use this to have the checkout automatically pre-select the users country based on their IP address. So a customer in the US will automatically have it pre-selected and only show the payment and shipping methods (with rates) that are available for the US, while a customer in France will only see valid options and prices for France.

In order to use GeoIP, you need to have installed the PEAR package called Net_GeoIP. You can have your system administrator make the installation for you. More details here:
http://pear.php.net/package/Net_GeoIP/

GeoIP database
For the GeoIP feature to work, you need a GeoIP database which contains the mapping between IP addresses and countries. This can be downloaded from www.maxmind.com - they have both a free version that is 99% acurate, and a commercial edition that is even more acurate.

Exclude/include fields

This setting group lets you choose which fields you want to be displayed in the checkout. You can currently only show/hide existing fields, it is not possible to create new ones without additional customization. The fields that can be excluded/included are:

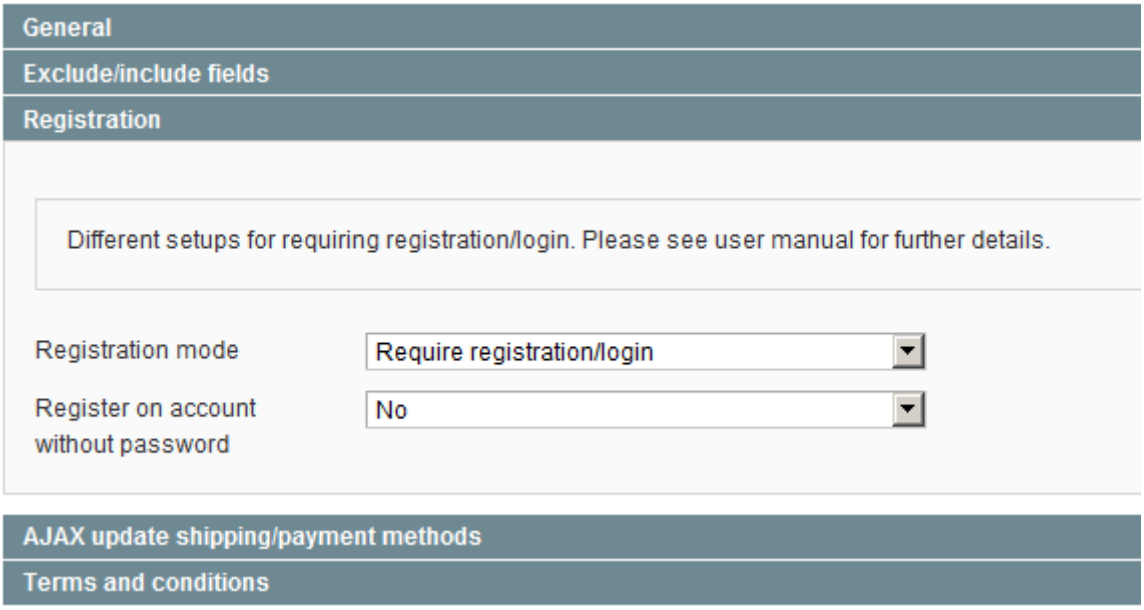
- City
- Region
- Zip/Postcode
- Telephone
- Company name
- Fax
- Comment
- Newsletter checkbox

The last two choices (comment and newsletter checkbox) is not available in Magento by default, but implemented as new fields in OneStepCheckout.

Registration

Different Magento stores have different needs with regards to registration and login features. Many stores prefer to disable registration completely, in order to keep the purchasing process as simple as possible. Some stores already have many registered customers, and want to continue providing this functionality.

To compensate for different Magento stores' needs for registration, OneStepCheckout offers different registration modes that can be changed in the administration interface. The different modes decide whether the user will be presented with a login screen, possibility to create account while placing the order and much more.



Registration modes

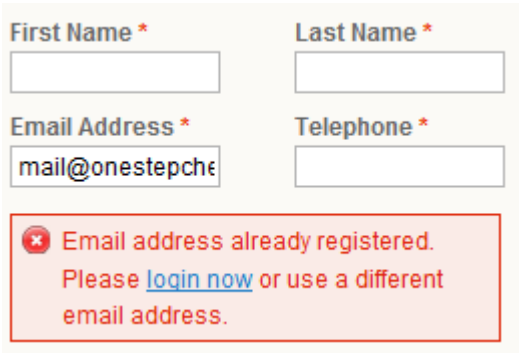
The currently available registration modes are currently:

- Require registration/login
- Disable registrartion/login
- Allow guests and logged in users
- Enable registration on success page
- Auto-generate account for new emails

Below are the different modes described in greater detail. There is also an additional option in the settings which is called "Register on account without password" and is explained at the end of this chapter.

Require registration/login
This registration mode will require a user to either login or create a new customer account while placing the order. At the top of the checkout, a link "Already registered? Click here to login" which opens a Javascript popup dialog asking the user to login.

The checkout form will then include fields for password and confirm password, as the user has to create an account in order to complete the purchase. If the user login to his account, the password fields will disappear as well as the email field (the logged in users email address will be used).



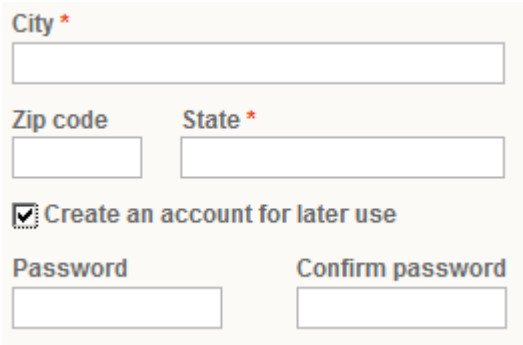
If the user starts to fill in the form and enters an email address that is already registered, an error will automatically display with the text "Email address already registered. Please login now or use a different email address".

If the user clicks the "login now" link, the same Javascript popup will open and allow the customer to login without leaving the checkout page. The user can also reset his password from this popup. When a different email address that isn't registered is entered, the error message will disappear.

Disable registration/login
This registration mode will completely deactivate registration and login from the checkout. The user will not see a link for logging in, and it will not be possible to create an account while placing the order.

All placed orders in this registration mode will be placed as "Guest". The only exception is if the user has been able to login with their account. If the user has been able to login, the order will be saved on that account, and not as "Guest".

OneStepCheckout will not display a link to login in this registration mode, but can be easily customized to do it if that is the behaviour you desire.



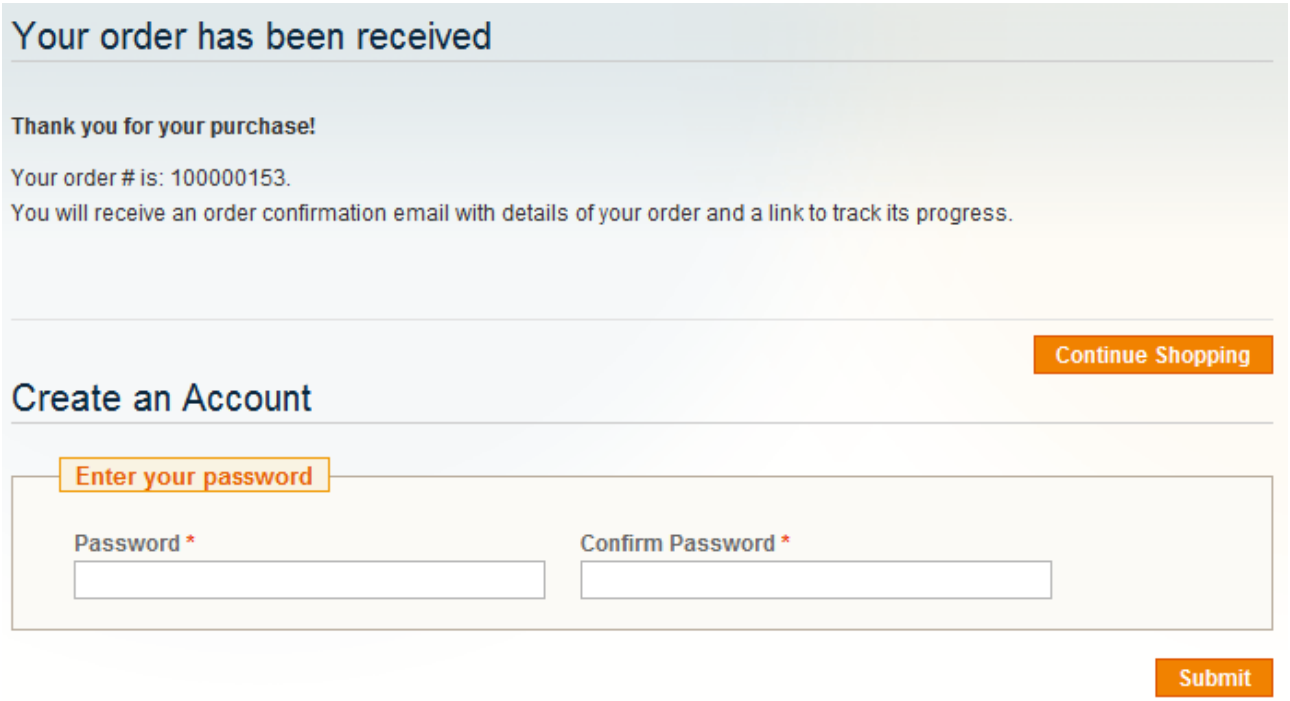
Allow guests and logged in users
This registration mode will allow both guests and logged in users to place an order. The mode also lets the customer decide whether he wants to create an account or not in the process.

At the top of the checkout there will be displayed a link if the customer wants to login, and at the bottom of the details the customer needs to enter, there is a checkbox for choosing whether to create a new account or not. If the user desires to create an account but enters an address that already exists, the customer will see an error stating that there already exists an account for this email address, and is asked to login.

Enable registration on success page
This registration mode allows you to remove the account creation from the checkout page, thus removing the possibility that the user might get confused with creating an account and exit the purchase process.

When the user enters the checkout, it is displayed as normal without asking if they want to create an account. A link to show the login popup is displayed at the top.

Once the order has been placed, and the user is redirected to the success page, if the email address used wasn't already registered, the user will be presented with a "Create an account" box at the bottom of the page (see screenshot below).


Your order has been received
Thank you for your purchase!
Your order # is: 100000153.
You will receive an order confirmation email with details of your order and a link to track its progress.
Continue Shopping
Create an Account
Enter your password
Password *
Confirm Password *
Submit

The only fields required to enter for creating an account is the password fields, and then the account will be automatically created with the details that were saved with the order that has just been placed.

If the customer decides to create an account, the newly placed order will be associated with that account, and the customer will have access to it under the "My orders" page in the customer account area.

Auto-generate account for new emails
This registration mode is suited for the stores that want users to have customer accounts, but does not want to bother the customer with asking whether they want to create an account, password, and so on. This is useful for stores that for example have downloadable products, and need users to have accounts so they can access their downloadable files after purchase.

This mode solves that by automatically creating customer accounts for new email addresses.

Customers will be presented with a regular checkout page without password fields. There will also be a link to display a login popup for users that are already registered.

Once the order has been placed, a new customer account will be generated automatically if the email address doesn't already exist in the database. The newly generated password will be sent to the user via email, and the order will be placed on the created account, giving the customer access to the order at all times from the customer account area on the page.

The customer will be automatically logged in with the new account, giving him instant access to any downloadable files.

Register on account without password
This is a setting and not part of the other registration modes. This can be enabled/disabled for the registration modes "Require registration/login" and "Auto-generate account for new emails".

By turning on this setting, you allow the customer to place an order on a existing customer account without requiring a password. So if the user enters an email address that already exists, instead of giving them an error requiring them to login, the checkout will not show any error messages and automatically place the order on that account in the background.

This is useful for stores that doesn't want to require password for existing accounts, and are worried that some users might exit the process if they are forced to login and can't remember their password.

AJAX update shipping/payment methods

Many stores offer different shipping methods and prices depending on what country and region in a country the customer resides in and wants the products shipped to. That makes it impossible to automatically show the correct methods and prices when the user enters the checkout.

That is why we have made the "AJAX save billing" feature. This feature allows you to choose which fields that should trigger an automatic update of shipping methods with prices, as well as payment methods.

Enable AJAX save billing
This setting turns on this feature.

AJAX save billing fields
This setting lets you choose which fields should trigger an update of shipping and payment methods. For example if you have a UPS shipping method which uses postcode to calculate it's price, you choose postcode in this field.

You can choose several fields at once, so you can update the payment/shipping methods when a user both changes Zipcode, and changes Country. Because many stores also offer different shipping/payment methods for different countries, in addition to for example having UPS calculate prices based on zipcode.

Update payment methods when chosen shipping method
Some stores have a setup where the available payment methods depend on the selected shipping method. By turning this feature on in OneStepCheckout, the payment methods block will update via AJAX when a shipping method is selected.

Troubleshooting

Are you experiencing some errors when trying to use OneStepCheckout? Here we have gathered the most common errors that our customers experience when using our product.

AJAX loading icon in checkout keeps spinning forever

OneStepCheckout uses AJAX requests to automatically update information when the user chooses a shipping method, payment method, and so on. If the AJAX requests fail, the loading icon will never disappear and keep spinning forever.

When OneStepCheckout behaves this way, it is almost always because the Magento installation is configured for SSL/HTTPS, but OneStepCheckout is loaded on HTTP instead of HTTPS.

This can be fixed easily by making sure OneStepCheckout loads on HTTPS instead of HTTP. In order to generate a link to the checkout using HTTPS, you need to use the following code:

```
<?php echo $this->getUrl('onestepcheckout', array('_secure'=>true)); ?>
```

Access denied in Administration panel

If you are seeing a "Access denied" error when trying to access the OneStepCheckout page in the administration panel after installing, this is caused by new permission roles that are defined by OneStepCheckout.

To fix this problem, all you need to do is logout and then login again with your administration account.

Sorry, guest checkout is not enabled error message

If you want OneStepCheckout to allow checkout out as a guest, you need to make sure that guest checkout is not disabled under System -> Configuration -> Checkout -> Checkout options.

Also, if you are using downloadable products, you need to make sure that the setting in System -> Configuration -> Catalog -> Downloadable product options called "Disable Guest Checkout if cart contains downloadable items" is set to "No".